

# THE NIELSEN TOTAL AUDIENCE REPORT

Q2 2018



**PETER KATSINGRIS, SVP  
AUDIENCE INSIGHTS**

Technology is intertwined in how we all live our lives, but particularly so among younger generations. They have always been early embracers and adopters of all technology from HiFi to WiFi. These days, smartphones, wireless headphones and other portable digital devices act almost as extensions of our appendages for many of us. They are perpetually by our side, accessible on a moment's notice, and can be purchased nearly anywhere. If that's not enough, we've given not just voices to technology, but names as well. Now that the technology has been refined, consumers are getting comfortable talking to a machine and those machines are not just listening, but responding with their own voices, actions, and information. To say the times have changed is an understatement.

Point is, as the media landscape continues to evolve it provides consumers with a variety of options to customize their media use across television, radio and digital. Time spent with the television set is shifting, with consumers spending more time using TV-connected devices to stream content in addition to traditional TV. Similarly, smart home devices are changing the way people interact with technology, whether it's to listen to music, give directives, or get updates on the latest news. More media content is also being accessed across digital platforms. Often, devices are used simultaneously with consumers choosing to multitask – researching something they heard or saw, checking email, online shopping, or simply staying connected with others.

This iteration of the *Nielsen Total Audience Report* provides a seasonal look at usage as we now have four full quarters of data based on a common methodology. It is important to note that seasonality plays a role across linear platforms, but less so for digital. Additionally, we outline what “prime time” is for each platform, giving us insight into time of day usage of different media devices. We also touch upon digital multitasking with linear platforms.

#### **HIGHLIGHTS FROM THIS Q2 2018 SUMMARY INCLUDE:**

- U.S. adults spend 10 hours and 24 minutes per day connected to media
- Adults 50-64 spend more time per day on media than any other age group
- Adults 18-34 spend more time on digital than TV and TV-connected devices
- Black adults spend 2 hours and 22 minutes longer per day across all media than average
- TV and TV-connected device usage peaks during the 9pm hour
- Nearly three-quarters (73%) of media time spent at 11pm is consumed through the TV glass
- 92% of adults listen to radio during the average week, more than any platform
- 19% of U.S. adults listen to podcasts each week
- 24% of households own a smart speaker
- vMVPDs exist in 3.4% of all TV households as of June 2018
- Over half of Asian American households have an enabled smart TV

More details on sources and methodologies used within the report can be found in the appendix. As a reminder, the data in this report reflects the expanded use of additional data sources and is not comparable to reports prior to Q1 2018; year-over-year comparisons will be made available on a going forward basis.

We are thrilled to be sharing this next version of our *Nielsen Total Audience Report* where we continue to provide new insights into where technology, interests and the consumers' media use intersect.

Thanks,

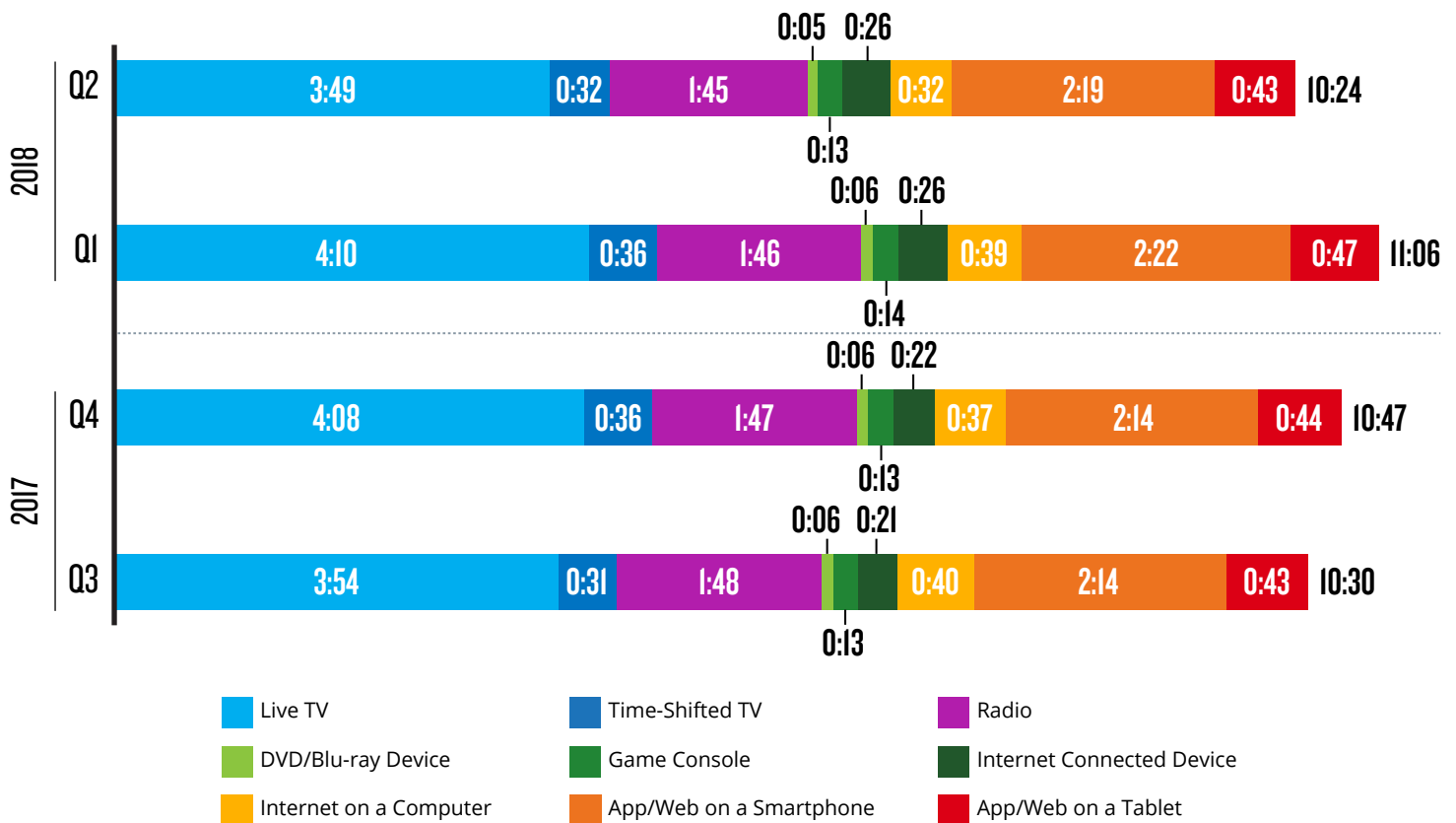
# MEDIA CONNECTED CONSUMERS

U.S. adults are spending 10 hours and 24 minutes per day interacting with media, whether that be watching, listening to, or reading content across all of their devices. While that time comprises 43% of the total minutes available in a day, it is very important to note that simultaneous usage does occur. It does, however, reflect that adults are engaged with at least one form of media for a significant portion of their waking hours.

From Q3 2017 to Q2 2018 time spent on media has fluctuated by as much as 41 minutes per day. Seasonality plays a large factor, with Live TV being the biggest contributor to the drop in total time from 11:06 in Q1 2018 to 10:24 in Q2 2018. Radio and Internet Connected Device usage, which includes Smart TV apps, stayed the same during that time, while digital (computer, smartphone, tablet) remained at 34% of the total. Smartphones alone accounted for 65% of total digital usage, up from 62% in Q1 2018.

**U.S. ADULTS SPEND 10 HOURS AND 24 MINUTES PER DAY CONNECTED TO MEDIA**

**AVERAGE TIME SPENT PER ADULT 18+ PER DAY**  
 BASED ON TOTAL U.S. POPULATION

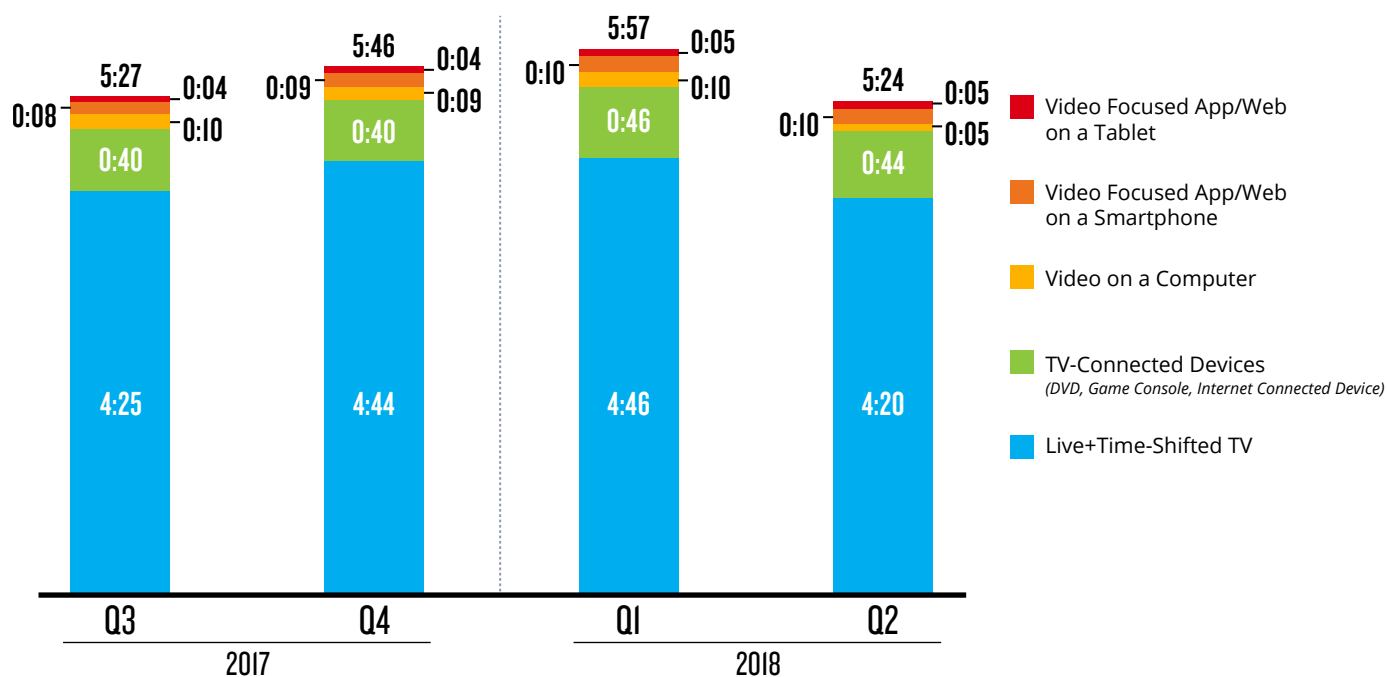


Note: Some amount of simultaneous usage may occur across devices. Internet Connected Device is inclusive of Smart TV app usage.

Overall video use—time spent with a TV set, video on a computer, and using video focused app/web on smartphones and tablets—among adults is 5 hours and 24 minutes per day. This is down from 5:57 in Q1 2018 but closer in line to the 5:27 in Q3 2017. Again, seasonality is a factor as high profile sporting events like the Super Bowl, Olympics, and March Madness occurred in Q1 2018. Despite that, time spent watching video on smartphones and tablets was equal to the previous quarter. Video on a smartphone and tablet only includes entities whose primary purpose is streaming video; there is a portion of video content (including viewing on social networking sites) not included here.

## AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO

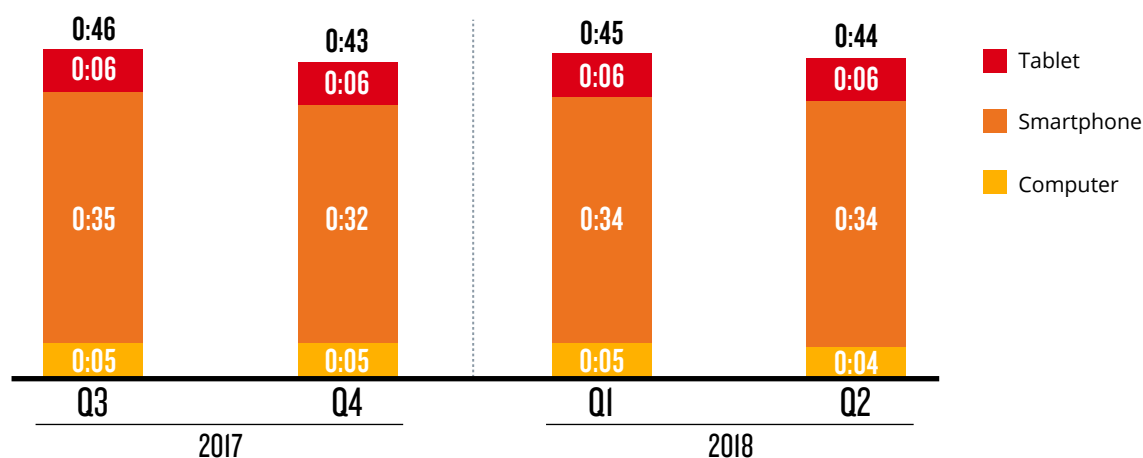
BASED ON TOTAL U.S. POPULATION



Social networking usage is not nearly as prone to seasonality as video usage and has remained consistent since Q3 2017. Adults spent 44 minutes per day engaging with social media in Q2 2018, whether that be reading, commenting, or viewing video across various platforms.

## AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON SOCIAL NETWORKING

BASED ON TOTAL U.S. POPULATION

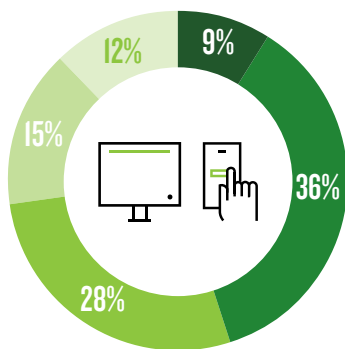


# SIMULTANEOUS USAGE OF DEVICES

With the vast amount of device usage that occurs throughout the day, it is inevitable that some of it is occurring simultaneously. TV viewing and digital device usage is naturally symbiotic. According to a custom survey of Nielsen’s Media Enthusiast Community, 45% of respondents watch TV while using digital devices very often or always. Audio and TV are less correlated, as only 6% often watch and listen to different content at the same time.

## SIMULTANEOUS USAGE - TV AND DIGITAL

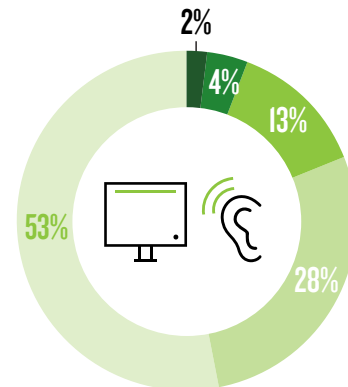
How often do you watch TV and use a digital device simultaneously?



Always Very Often Sometimes Rarely Never

## SIMULTANEOUS USAGE - TV AND AUDIO

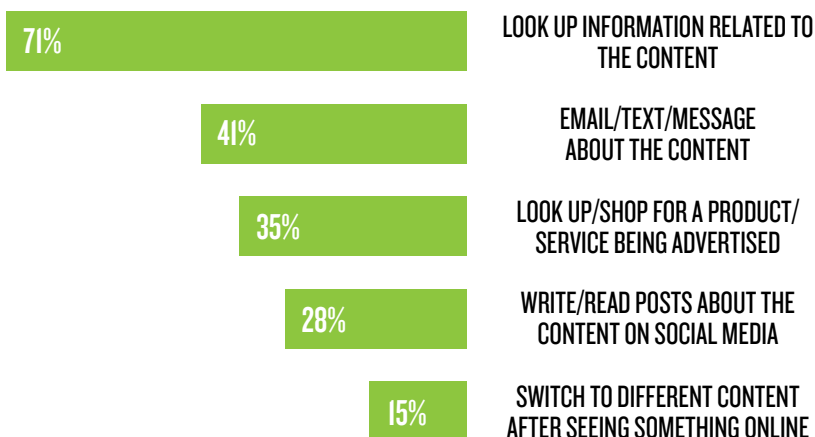
How often do you watch TV and use an audio device simultaneously?



Digital devices are often used in tandem with TV and audio to augment users’ overall experience. 71% of respondents have looked up information related to the TV content they were viewing, while 51% did the same for audio. There are also e-commerce opportunities abound, as 35% of TV viewers and 25% of audio listeners have shopped for the products and services advertised on the main platform.

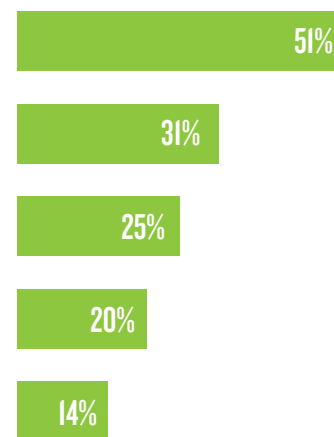
## DIGITAL USAGE WHILE WATCHING TV

In what ways have you used your digital device to engage with the TV content you were watching?



## DIGITAL USAGE WHILE LISTENING TO AUDIO

In what ways have you used your digital device to engage with the audio content you were listening to?





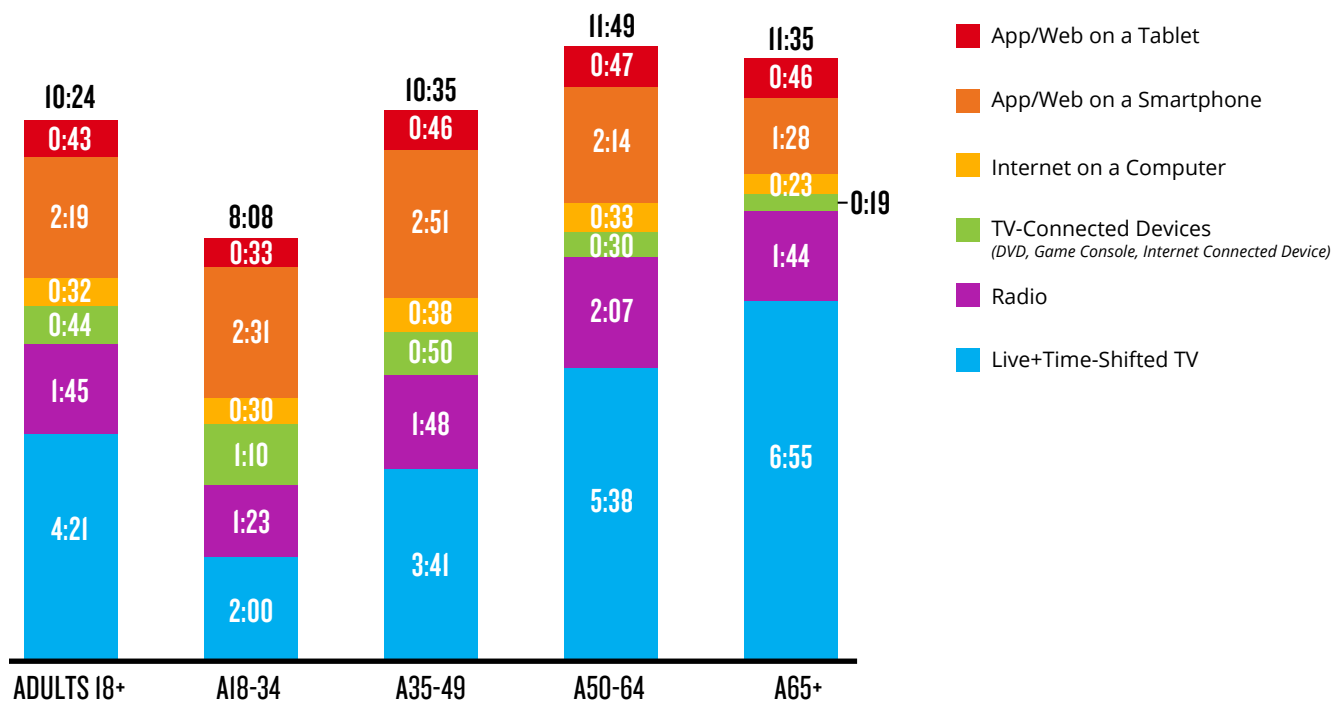
# MEDIA TIME BY DEMOGRAPHIC

When looking at total time spent and the distribution of time spent across media platforms by age some clear patterns emerge – they just might not be exactly what you would expect. Adults 50-64 spend more overall time per day than any other group connected to media at 11 hours 49 minutes, including the most time on radio (2 hours 7 minutes). Younger consumers spend more of their time using TV-connected devices and digital platforms, while older demos are still the most voracious consumers of linear television and radio.

**ADULTS 50-64 SPEND MORE TIME PER DAY ON MEDIA THAN ANY OTHER AGE GROUP**

## Q2 2018 DAILY HOURS:MINS OF USAGE

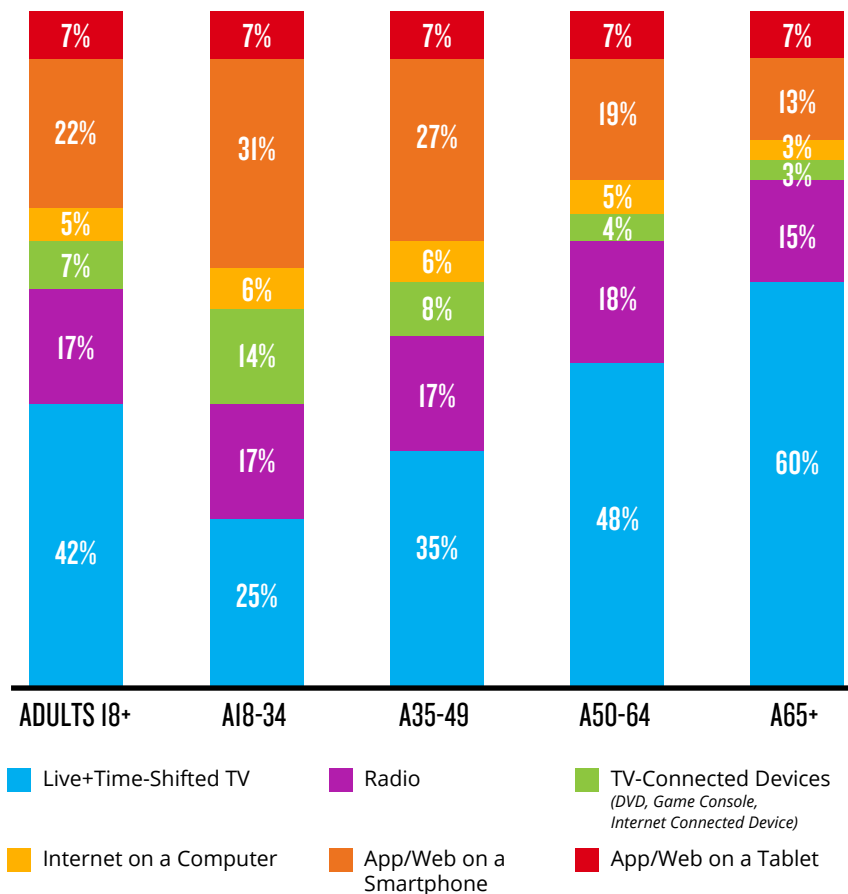
BASED ON TOTAL U.S. POPULATION



There are also several notable patterns when examining the share of time spent on each platform by age. Adults ages 50-64, who spend the most overall time on media of any age group, spend 52% of their time watching TV and TV-connected devices and 31% on digital platforms. Conversely, adults 18-34 spend more time on digital (44%) than TV and TV-connected devices (39%). Regardless of age, radio consistently accounts for between 15-18% of daily media use and tablet usage is 7% across all groups.

## Q2 2018 SHARE OF DAILY TIME SPENT BY PLATFORM

BASED ON TOTAL U.S. POPULATION



### ADULTS 18-34 SPEND MORE TIME ON DIGITAL THAN TV AND TV-CONNECTED DEVICES

# THE MULTICULTURAL CONSUMER

The increased racial and ethnic diversity across the U.S. is more prevalent than ever, and media usage is just one of the ways these differences and similarities are showcased. While every individual has uniquely personalized media habits, some patterns emerge by race and ethnicity just as they do by age. Black adults spend 12 hours and 46 minutes per day on media, which is 23% more time than the average adult. They are the most avid consumers of media, spending more time on live TV, TV-connected devices, and smartphones than any other group. While Blacks spend over 3 and a half hours longer per day than Hispanic adults on media, Hispanics still over-index on radio, TV-connected device, and smartphone usage. Asian-American adults spend more time than any other group on computers and tablets, and also over-index on smartphone usage.

## AVERAGE TIME SPENT PER ADULT 18+ PER DAY BASED ON TOTAL U.S. POPULATION – Q2 2018

	TOTAL	BLACK	HISPANIC	ASIAN AMERICAN
Live TV	3:49	5:39	2:55	1:58
Time-Shifted TV	0:32	0:31	0:19	0:16
Radio	1:45	1:50	1:50	n/a
DVD/Blu-ray Device	0:05	0:06	0:04	0:03
Game Console	0:13	0:15	0:14	0:09
Internet Connected Device	0:26	0:30	0:28	0:31
Internet on a Computer	0:32	0:27	0:21	0:41
App/Web on a Smartphone	2:19	2:47	2:20	2:23
App/Web on a Tablet	0:43	0:41	0:37	0:45
<b>Total</b>	<b>10:24</b>	<b>12:46</b>	<b>9:08</b>	<b>6:46*</b>

\*Radio measurement includes Asian Americans but cannot be separated from the total audience at this time

**BLACK ADULTS SPEND 2 HOURS  
AND 22 MINUTES LONGER PER DAY  
ACROSS ALL MEDIA THAN AVERAGE**



Black adults are spending the most time by far on total video use at 7 hours 31 minutes per day. They are spending the most time on Live+Time-shifted TV viewing, TV-connected device usage, and video focused app/web on a smartphone. Hispanics also over-index on TV-connected devices, and Blacks, Hispanics, and Asian Americans all over-index on digital video as a whole. Asian Americans spend the least amount of time with video, but digital accounts for the highest percentage of their viewing at 11%.

## AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON VIDEO

BASED ON TOTAL U.S. POPULATION – Q2 2018

	TOTAL	BLACK	HISPANIC	ASIAN AMERICAN
Live+Time-Shifted TV	4:20	6:10	3:14	2:14
TV-Connected Devices	0:44	0:51	0:45	0:43
Video on a Computer	0:05	0:06	0:05	0:07
Video Focused App/Web on a Smartphone	0:10	0:19	0:15	0:09
Video Focused App/Web on a Tablet	0:05	0:05	0:08	0:06
<b>Total</b>	<b>5:24</b>	<b>7:31</b>	<b>4:27</b>	<b>3:19</b>

In stark contrast to video consumption, social media usage is more consistent across different races and ethnicities. Asian Americans are spending the most time on social networks at 47 minutes per day, with Hispanics at 45 minutes and Blacks slightly under-indexing at 43 minutes per day. Hispanics also spend the most time using social media on their smartphones at 39 minutes per day, which is 87% of their total usage and the highest of any group.

## AVERAGE TIME SPENT PER ADULT 18+ PER DAY ON SOCIAL NETWORKING

BASED ON TOTAL U.S. POPULATION – Q2 2018

	TOTAL	BLACK	HISPANIC	ASIAN AMERICAN
Computer	0:04	0:03	0:02	0:05
Smartphone	0:34	0:35	0:39	0:36
Tablet	0:06	0:05	0:04	0:06
<b>Total</b>	<b>0:44</b>	<b>0:43</b>	<b>0:45</b>	<b>0:47</b>

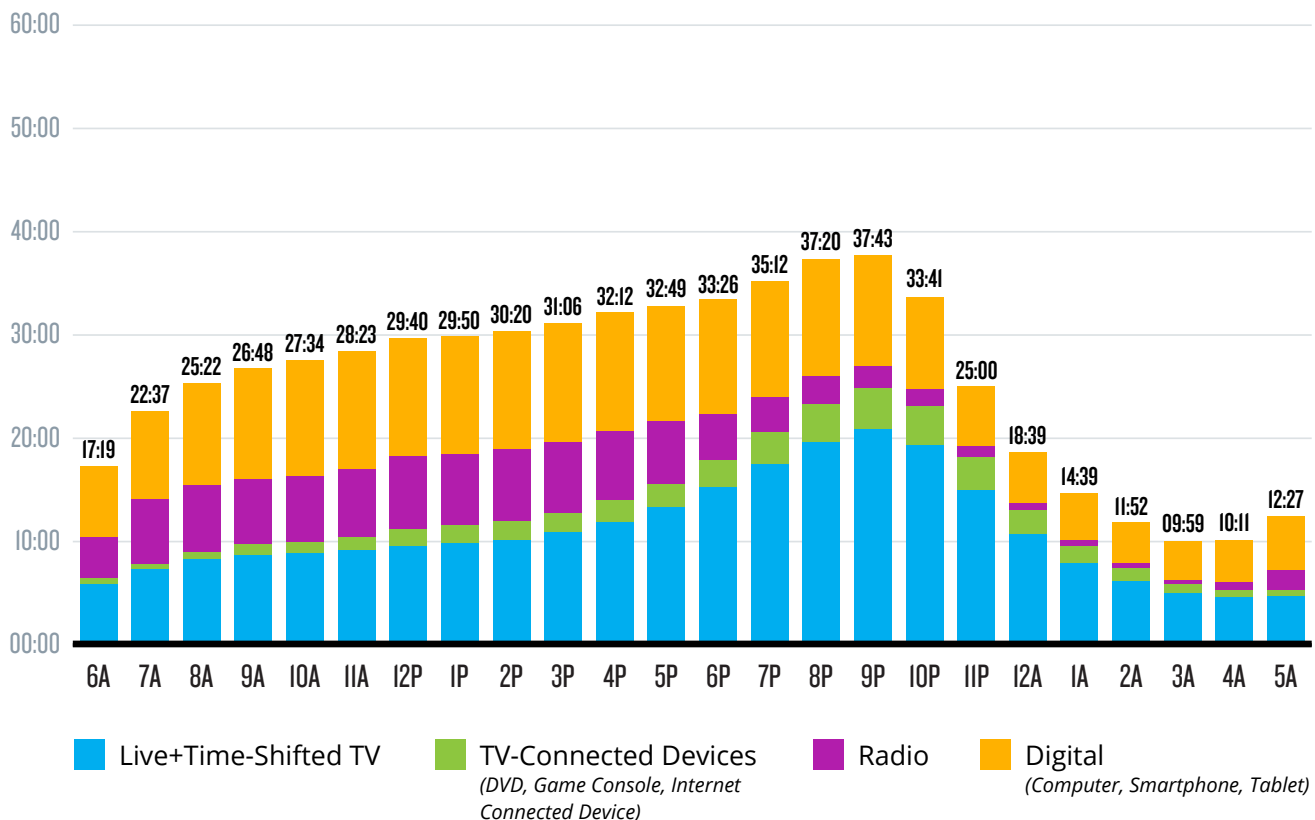
# MEDIA USAGE BY TIME OF DAY

As noted earlier, U.S. adults spend 10 hours 24 minutes per day engaging with media across all platforms, but that usage is not necessarily uniformly distributed throughout the day. Access and convenience are two of the key factors that determine how people consume media at different times.

So, is prime time still relevant in this era of device fragmentation? The answer is a resounding “Yes” as adults spend more time on media from 9-10 pm than any other hour throughout the day. Nearly 38 out of a possible 60 minutes are spent across Live+Time-shifted TV, TV-connected devices, radio, and digital (computer, smartphone, tablet) during that time. The 9pm hour is also peak viewing time for both TV and TV-connected device usage. Radio is more closely tied to traditional business hours. Listening time peaks at 12pm but radio’s share of total media time spent per hour is consistently at its highest between 7am and 5pm. Digital usage is also consistent for an even longer period of time throughout the day. There is less than a one minute fluctuation in time spent from 9am-9pm. From morning until night, the internet is an integral part of people’s lives.

**TV AND TV-CONNECTED DEVICE USAGE PEAKS DURING THE 9PM HOUR**

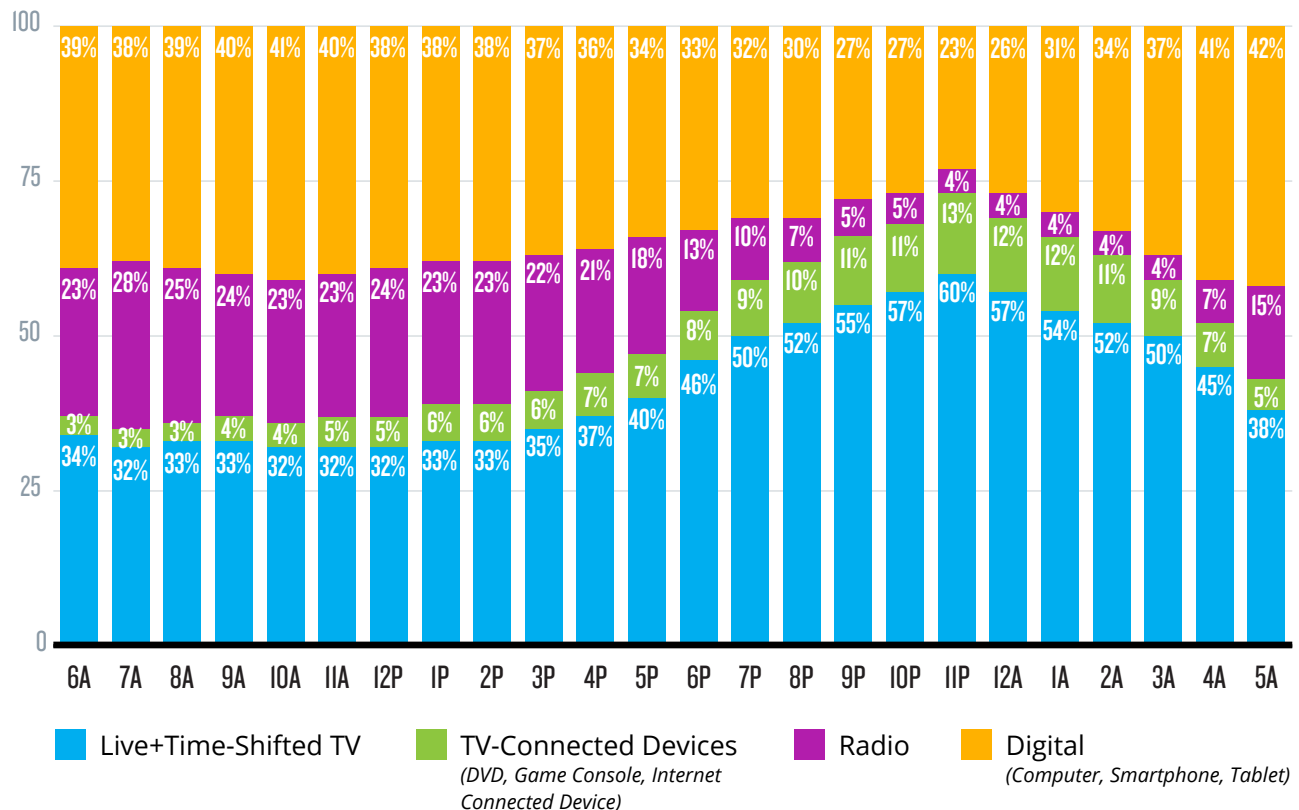
**Q2 2018 AVERAGE TIME SPENT (MINS:SECS)  
PER ADULT 18+ BY HOUR (MO-SU)  
BASED ON TOTAL U.S. POPULATION**



Looking at the share of time spent by hour provides even more insight into the platforms and devices people prefer to use throughout the day. During the 9pm hour, when overall media usage is at its greatest, Live+Time-shifted TV and TV-connected device usage accounts for two-thirds of total time spent on media. However, the TV glass is most prevalent at 11pm, as Live+Time-shifted TV (60%) and TV-connected devices (13%) are both at their highest in terms of share of time spent.

TV time has the greatest effect on the share of time spent with computers, smartphones, and tablets. Digital share is at its lowest during the same 9pm-12am window in which TV and TV-connected device share of time spent is at an apex. Radio share of time spent is highest at 7am (28%), and it remains greater than 20% throughout the day from 6am-4pm. In fact, if we only looked at weekdays, we would see increased shares of time spent with radio during commute and working hours.

## Q2 2018 SHARE OF DAILY TIME SPENT BY PLATFORM PER ADULT 18+ BY HOUR (MO-SU) BASED ON TOTAL U.S. POPULATION



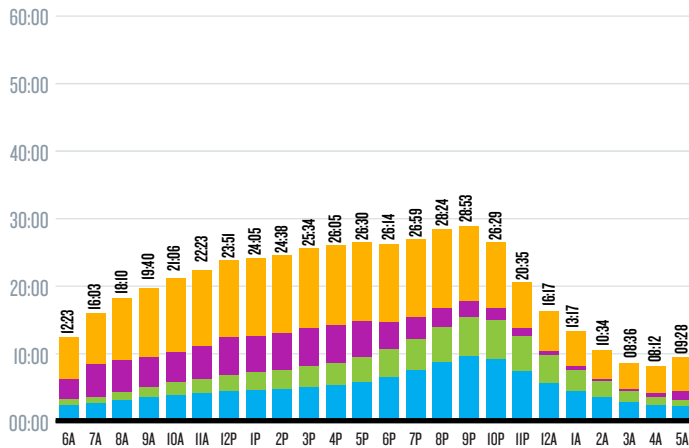
**73% OF MEDIA TIME SPENT AT 11PM IS CONSUMED THROUGH THE TV GLASS**

While people of different ages display distinct usage patterns throughout the day, there are still a number of similarities that transcend age. In terms of overall time spent on media, 9pm is the peak for ages 18-64, while adults 65+ have their highest media usage one hour earlier at 8pm. However, adults 65+ have their greatest amount of viewing through the TV glass at 9pm along with the other age groups.

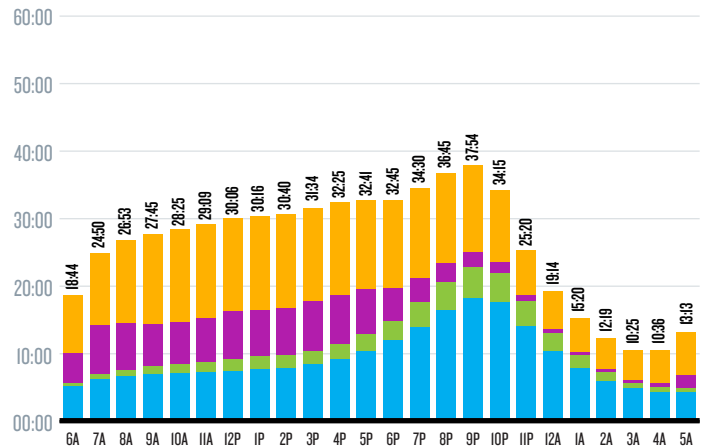
Among all age groups and dayparts, digital usage is highest at 2pm among adults 35-49 at just under 14 minutes. Radio peaks among 50-64 at 12pm with a listening time of 8 minutes 34 seconds. Adults 18-34 are the heaviest users of TV-connected devices, with their greatest amount of time spent occurring from 9-11pm with 5 minutes 51 seconds of usage.

## Q2 2018 AVERAGE TIME SPENT (MINS:SECS) BY HOUR (MO-SU) BASED ON TOTAL U.S. POPULATION

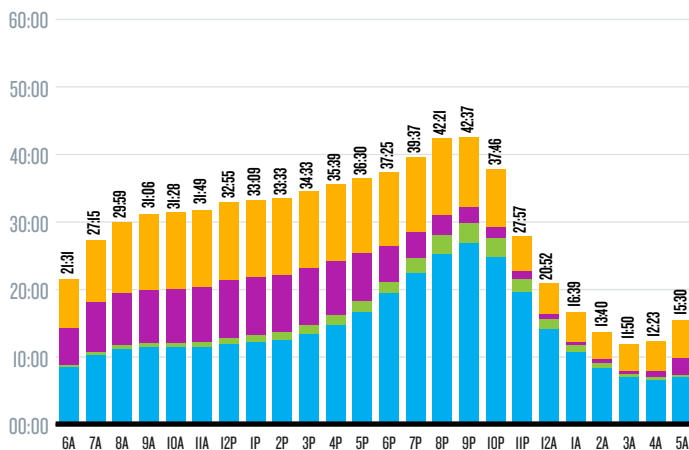
### A18-34



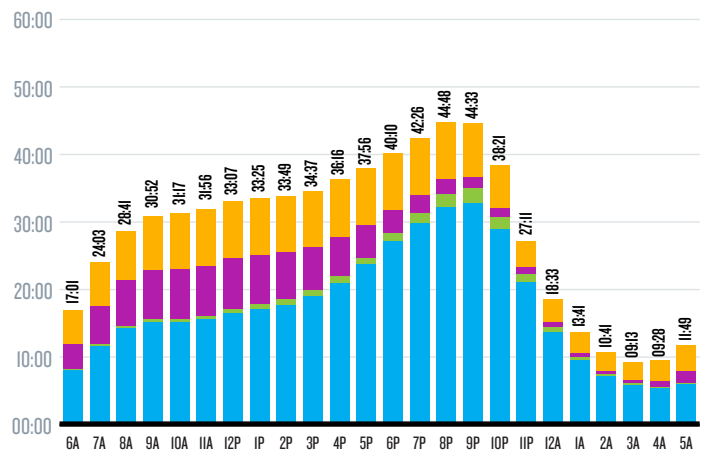
### A35-49



### A50-64



### A65+



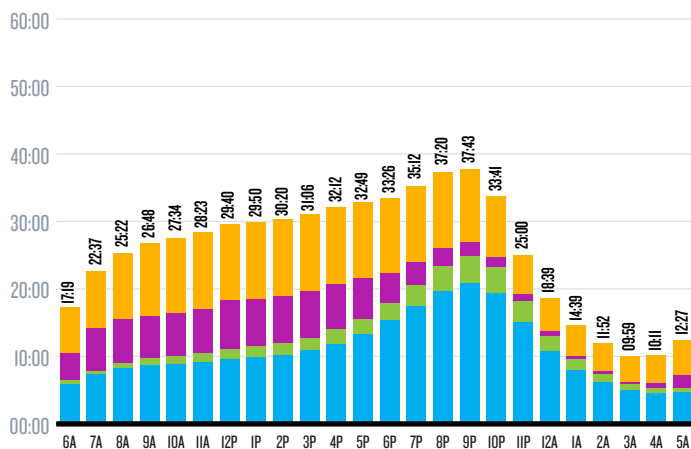
■ Live+Time-Shifted TV    
 ■ TV-Connected Devices (DVD, Game Console, Internet Connected Device)    
 ■ Radio    
 ■ Digital (Computer, Smartphone, Tablet)

Just as there are similarities by age, users of different races and ethnicities exhibit many of the same characteristics when it comes to media consumption by daypart. Again, 9pm is the hour with the greatest amount of usage for Black, Hispanic, and Asian American adults. Blacks are spending the most time across platforms with just under 42 minutes, or 70% of the available time during that hour.

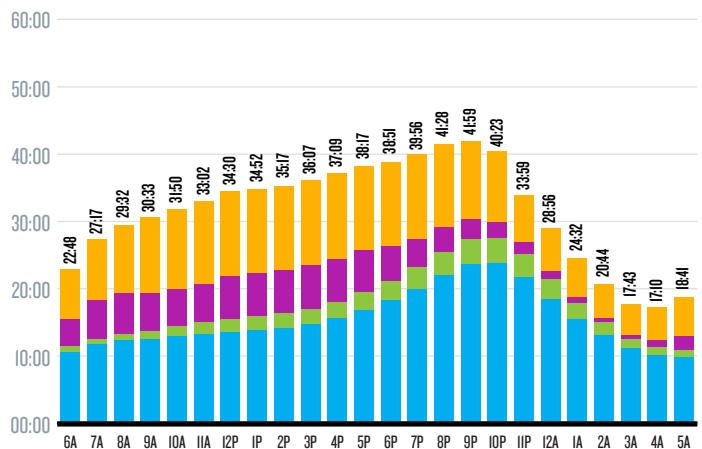
While overall time is at its apex at 9pm, the most Live+Time-shifted TV is being watched by Blacks at 10pm with 23 minutes 51 seconds. TV-connected devices are most heavily used by Asian Americans at 9pm at 4 minutes 9 seconds. Hispanics are the most avid radio listeners overall, and their usage peaks at 3pm, narrowly edging out 12pm and 2pm with 7 minutes 10 seconds. Digital usage is also very similar across all groups but the highest usage is at 4pm by Blacks with 12 minutes 43 seconds.

## Q2 2018 AVERAGE TIME SPENT (MINS:SECS) BY HOUR (MO-SU) BASED ON TOTAL U.S. POPULATION

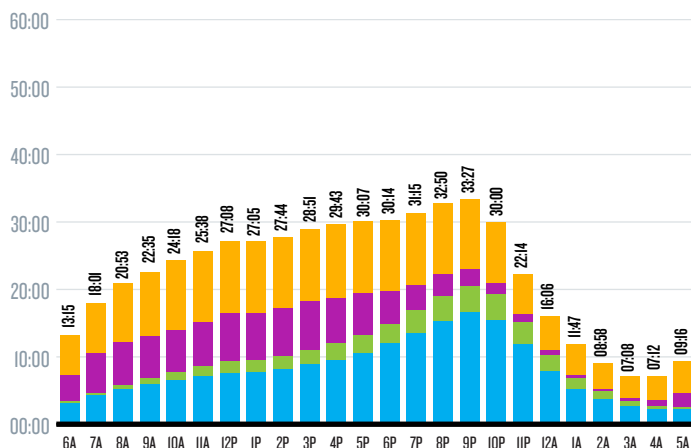
### ADULTS 18+



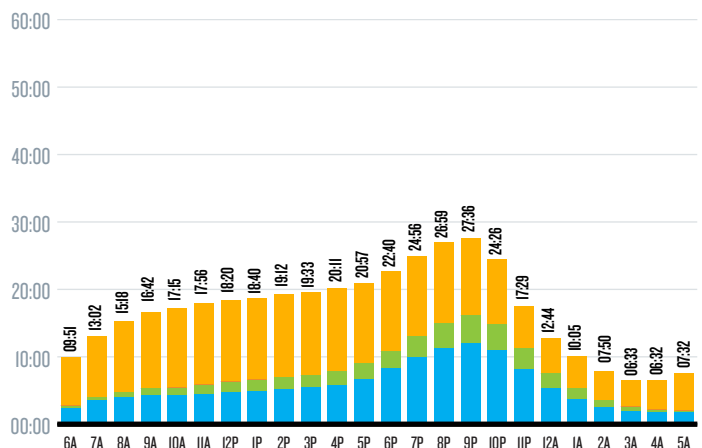
### BLACK 18+



### HISPANIC 18+



### ASIAN AMERICAN 18+



\* Radio measurement includes Asian Americans but cannot be separated from the total audience at this time. Radio is not included on the Asian American chart.

# WEEKLY REACH ACROSS PLATFORMS

Despite the number of choices now available and the proliferation of new devices, linear platforms still reach the greatest number of U.S. adults each week. Radio has the largest reach across all platforms at 92%, and among Hispanics weekly reach was nearly ubiquitous at 96%. Live+Time-shifted TV viewing reached 87% of adults in Q2 2018, with Blacks having the highest reach at 90%.

**92% OF ADULTS LISTEN TO RADIO DURING THE AVERAGE WEEK**

Asian Americans have embraced digital and emerging technologies more than any other group. They have the highest reach of internet connected devices (including apps on their smart TVs) at 43% and the greatest reach for computer, smartphone, and tablet usage. Hispanics have the highest reach of game console usage at 18% and also over-index on smartphone usage.

## Q2 2018 WEEKLY REACH % OF USERS 18+ AMONG U.S. POPULATION

### LIVE+TIME-SHIFTED TV



### RADIO



### DVD/BLU-RAY DEVICE



### INTERNET ON A COMPUTER



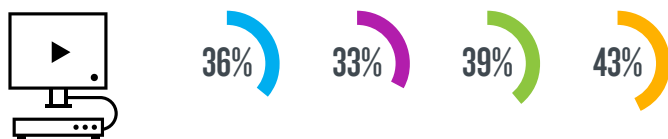
### GAME CONSOLE



### APP/WEB ON A SMARTPHONE



### INTERNET CONNECTED DEVICE



### APP/WEB ON A TABLET



■ Total     
 ■ Black     
 ■ Hispanic     
 ■ Asian American

P18+ Total Universe (millions)	247	31	39	16
% of P18+ Total Universe		13%	16%	7%

Radio measurement includes Asian Americans but cannot be separated from the total audience at this time

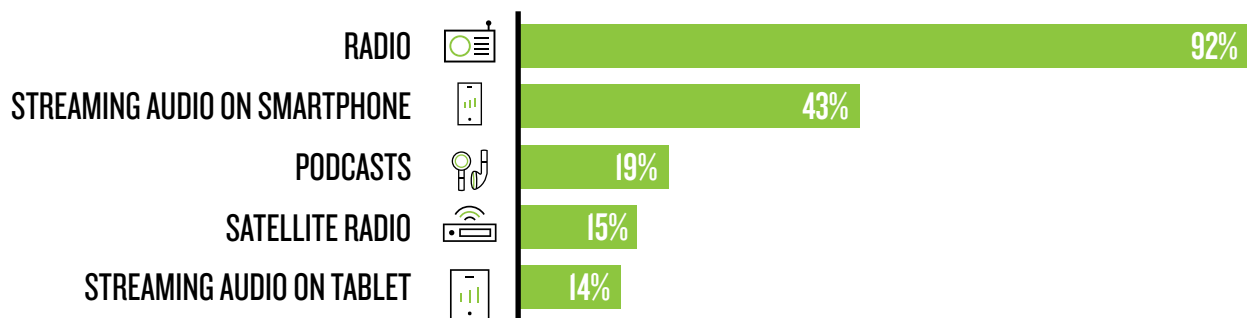
# THE AUDIO UNIVERSE

Audio is experiencing a new golden age as new formats and distribution models emerge. Podcasts, for example, are rapidly growing in popularity and now reach nearly one-fifth of U.S. adults weekly. Meanwhile radio, the original audio provider, continues to reach more Americans each week (92%) than any other media platform.

## 19% OF U.S. ADULTS LISTEN TO PODCASTS EACH WEEK

### WEEKLY REACH OF AUDIO AMONG ADULTS 18+

BASED ON TOTAL U.S. POPULATION - Q2 2018

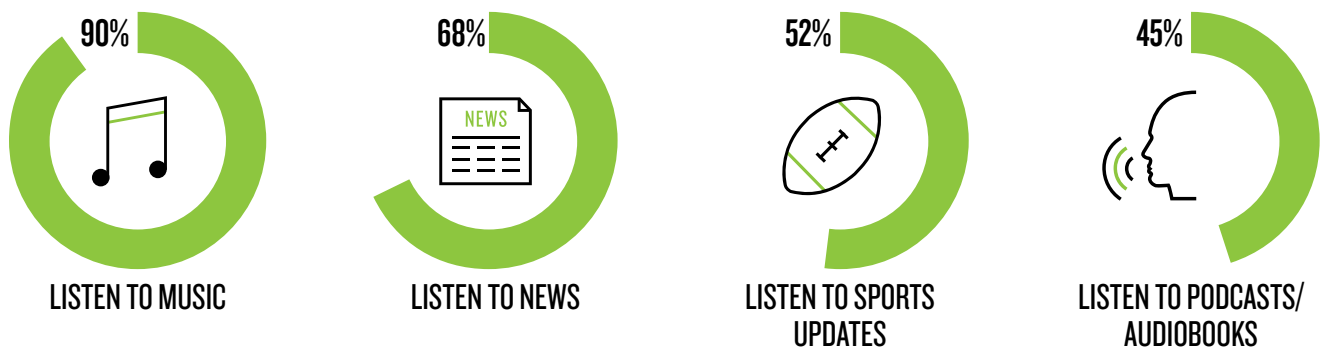


New technologies are also playing a role in how audio is consumed. Smart speakers can now be found in 24% of all households, up from 22% in Q1 2018. They are enhancing the in-home audio experience, but what are consumers listening to? According to the Q2 2018 Nielsen MediaTech Trender, a quarterly consumer tracking survey which concentrates on emerging technology devices and services, 90% of smart speaker users are listening to music, with half of that (45%) listening to podcasts or audiobooks.

## 24% OF HOUSEHOLDS OWN A SMART SPEAKER

### SMART SPEAKER AUDIO ACTIVITIES

*In what ways do you use your smart speaker each week?*





# TYPES OF TELEVISION HOUSEHOLDS

When describing the types of television households that exist today the key word to consider is “choice”. Consumers have more choices than ever on how to access TV content, from the perspective of both device and delivery. The one constant throughout this change is that a television household is defined as one that can view content on a television set.

Over four out of five households are Total Multichannel homes, meaning they have access to cable content whether it’s through traditional cable or a virtual multichannel video programming distributor (vMVPD). Asian American households have the highest vMVPD penetration (6.1%) while Hispanic households are most likely to be over the air homes (20.6%). Fifteen percent of homes that subscribe to a vMVPD also subscribe to traditional cable services, 35% are over the air, and 50% are broadband only households.

## VMVPDS EXIST IN 3.4% OF ALL TV HOUSEHOLDS AS OF JUNE 2018

### TELEVISION DISTRIBUTION STATUS

% OF TV HOUSEHOLDS

	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	JUNE 2017	JUNE 2018	JUNE 2017	JUNE 2018	JUNE 2017	JUNE 2018	JUNE 2017	JUNE 2018
<b>Traditional Cable</b>	81.3%	77.4%	78.8%	75.5%	74.3%	69.8%	73.8%	66.2%
<b>vMVPD</b>	1.4%	3.4%	1.2%	3.4%	1.4%	3.2%	2.8%	6.1%
<b>Over The Air</b>	12.6%	12.9%	16.5%	16.8%	19.5%	20.6%	8.9%	12.9%
<b>Broadband Only</b>	4.7%	6.3%	3.4%	4.4%	4.8%	6.4%	14.7%	14.7%
<b>Total Multichannel</b>	<b>82.7%</b>	<b>80.8%</b>	<b>80.1%</b>	<b>78.9%</b>	<b>75.7%</b>	<b>73.0%</b>	<b>76.6%</b>	<b>72.3%</b>

Note: Traditional Cable, vMVPD, Over the Air, and Broadband Only breaks are mutually exclusive. Total Multichannel is the sum of Traditional Cable and vMVPD.



# DEVICES AND SERVICES IN THE HOUSEHOLD

Just as there are added choices in how content is accessed, the devices by which people consume media are also improving and evolving. Some devices, such as DVD/Blu-ray players, are in the declining phase of their product life cycle as streaming devices gain prominence. As a result, DVD/Blu-ray player penetration dropped to 66% in June 2018 from 72% one year prior, while internet connected devices increased from 34% to 38% and enabled smart TV penetration grew from 31% to 40%.

Digital devices have also approached the maturity stage of their life cycle, as the rapid growth in penetration of years past has slowed due to mass adoption. Computer ownership remained flat at 79% from June 2017 to June 2018, while smartphones increased to 90% from 88% and tablets to 64% from 63%. As the underlying technology and software within these devices improve users are receiving a better experience accessing content than ever before.

Among multicultural homes, Asian Americans own the greatest number of devices. They have the highest penetration of enabled smart TVs, internet connected devices, computers, smartphones, and tablets. Hispanics homes have the highest game console penetration and over index with respect to both streaming capable and mobile devices.

## OVER HALF OF ASIAN AMERICAN HOUSEHOLDS HAVE AN ENABLED SMART TV

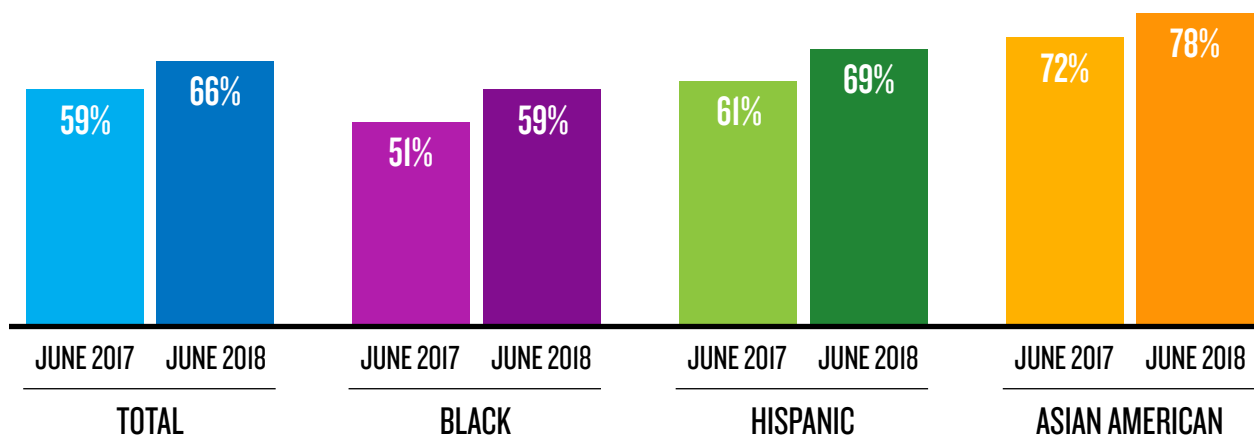
### DEVICE OWNERSHIP % IN TV HOUSEHOLDS

	TOTAL		BLACK		HISPANIC		ASIAN AMERICAN	
	JUNE 2017	JUNE 2018	JUNE 2017	JUNE 2018	JUNE 2017	JUNE 2018	JUNE 2017	JUNE 2018
DVD/Blu-ray Player	72%	66%	67%	60%	63%	57%	58%	53%
DVR	54%	55%	52%	53%	47%	50%	46%	46%
Enabled Smart TV	31%	40%	28%	37%	37%	47%	45%	51%
Internet Connected Device	34%	38%	33%	39%	36%	40%	54%	56%
Game Console	43%	42%	42%	42%	52%	53%	46%	47%
Computer	79%	79%	68%	68%	70%	69%	91%	89%
Smartphone	88%	90%	89%	92%	94%	95%	95%	96%
Tablet	63%	64%	56%	57%	63%	63%	77%	75%

Subscription-based video on demand (SVOD) services are now available in two-thirds of television households. SVOD services such as Netflix, Hulu, and Amazon Prime provide additional choice of content when users are selecting what to watch, and for many these services are a preferred destination for binge viewing over an extended period of time.

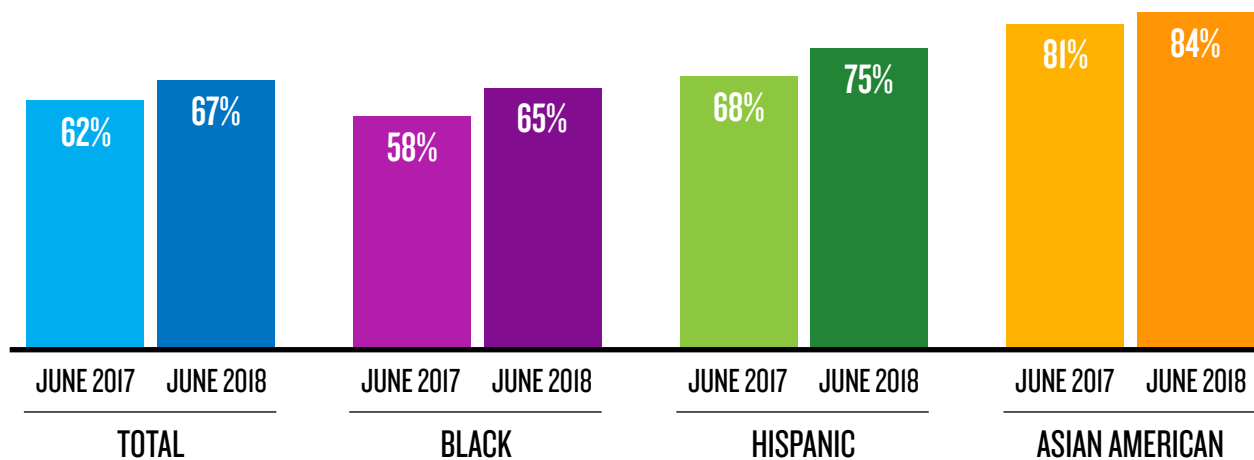
SVOD services are experiencing year over year growth among all races and ethnicities. They have the highest penetration among Asian American households at 78%, and Hispanic households also over index compared to the total U.S.

## SUBSCRIPTION VIDEO ON DEMAND HOUSEHOLD ACCESS %



Internet enabled TV-connected devices — enabled smart TVs, internet connected devices (i.e. Apple TV, Roku, Google Chromecast, Amazon Fire TV), and enabled game consoles — can also be found in over two thirds of U.S. households, up from 62% a year ago. Asian American households have the highest penetration at 84%, compared to Hispanics at 75% and Blacks at 65%.

## INTERNET ENABLED TV-CONNECTED DEVICES HOUSEHOLD ACCESS %





# DATA TABLES

# Q2 2018 WEEKLY TIME SPENT IN HOURS: MINUTES AMONG U.S. POPULATION

	A 18+	A 18-34	A 35-49	A 50-64	A 65+	A 18-49	A 25-54	BLACK 18+	HISPANIC 18+	ASIAN AM. 18+
<b>Total Use of Television</b>	35:31	22:13	31:33	42:51	50:36	26:26	30:31	49:06	27:56	20:33
<b>Live+Time-Shifted TV</b>	30:22	14:02	25:48	39:26	48:26	19:21	24:06	43:09	22:38	15:35
<b>Time-Shifted TV</b>	3:41	1:44	3:45	4:49	5:04	2:39	3:19	3:34	2:10	1:49
<b>TV-Connected Devices</b>	5:09	8:11	5:45	3:25	2:11	7:05	6:25	5:56	5:18	4:58
<b>DVD/Blu-ray Device</b>	0:36	0:32	0:41	0:40	0:32	0:36	0:39	0:40	0:29	0:22
<b>Game Console</b>	1:33	3:32	1:28	0:25	0:09	2:36	1:56	1:48	1:35	1:01
<b>Internet Connected Device</b>	3:00	4:07	3:36	2:19	1:29	3:53	3:50	3:28	3:14	3:35
<b>Radio</b>	12:12	9:42	12:37	14:46	12:09	11:01	12:12	12:51	12:49	n/a
<b>Internet on a Computer</b>	3:42	3:32	4:32	3:52	2:41	3:59	4:17	3:08	2:27	4:45
<b>Social Networking</b>	0:30	0:25	0:36	0:35	0:22	0:30	0:34	0:20	0:15	0:36
<b>Video on a Computer</b>	0:38	0:52	0:50	0:29	0:12	0:51	0:50	0:41	0:37	0:52
<b>App/Web on a Smartphone</b>	16:11	17:40	19:57	15:38	10:13	18:42	19:05	19:30	16:22	16:40
<b>Video Focused App/Web</b>	1:11	1:54	1:23	0:50	0:23	1:40	1:26	2:10	1:46	1:02
<b>Streaming Audio</b>	0:28	0:45	0:33	0:18	0:09	0:40	0:34	0:39	0:34	0:32
<b>Social Networking</b>	3:55	5:18	4:46	3:04	1:55	5:03	4:48	4:08	4:34	4:11
<b>App/Web on a Tablet</b>	4:59	3:52	5:24	5:33	5:22	4:34	5:01	4:49	4:18	5:15
<b>Video Focused App/Web</b>	0:38	0:48	0:51	0:28	0:20	0:50	0:48	0:32	0:57	0:44
<b>Streaming Audio</b>	0:06	0:07	0:07	0:06	0:03	0:07	0:06	0:44	0:05	0:06
<b>Social Networking</b>	0:41	0:30	0:42	0:46	0:50	0:36	0:41	0:34	0:30	0:42

Note: Internet Connected Device is inclusive of Smart TV app usage.

## Q2 2018 WEEKLY TIME SPENT IN HOURS: MINUTES AMONG USERS OF EACH MEDIUM

	A 18+	A 18-34	A 35-49	A 50-64	A 65+	A 18-49	A 25-54	BLACK 18+	HISPANIC 18+	ASIAN AM. 18+
<b>Total Use of Television</b>	36:42	23:49	31:42	43:02	51:00	27:37	31:09	48:48	28:31	23:32
<b>Live+Time-Shifted TV</b>	32:33	16:05	26:43	40:09	49:07	21:21	25:39	43:53	24:04	19:12
<b>Time-Shifted TV</b>	6:51	3:44	6:06	8:11	9:52	5:00	5:44	6:29	4:55	4:32
<b>TV-Connected Devices</b>	9:30	12:26	9:04	7:18	6:17	10:54	10:06	11:13	9:13	9:06
<b>DVD/Blu-ray Device</b>	4:07	4:47	4:04	4:07	3:34	4:22	4:19	5:08	4:04	3:42
<b>Game Console</b>	9:29	11:34	7:28	5:54	5:16	10:06	8:54	10:42	8:14	8:13
<b>Internet Connected Device</b>	7:49	8:50	7:40	7:04	6:36	8:17	8:12	9:31	7:38	7:57
<b>Radio</b>	13:22	10:47	13:30	15:48	13:50	12:02	13:08	13:58	13:23	n/a
<b>Internet on a Computer</b>	6:52	6:31	7:41	7:02	5:57	7:04	7:25	6:35	5:52	7:29
<b>Social Networking</b>	1:53	1:34	1:59	2:10	1:50	1:46	1:55	1:38	1:25	1:50
<b>Video on a Computer</b>	2:46	3:21	3:09	2:16	1:23	3:15	3:10	3:07	3:23	2:57
<b>App/Web on a Smartphone</b>	20:50	20:47	23:08	19:55	18:17	21:51	22:17	24:41	20:43	20:23
<b>Video Focused App/Web</b>	2:00	2:39	1:59	1:32	1:05	2:21	2:04	3:19	2:42	1:39
<b>Streaming Audio</b>	1:05	1:17	1:07	0:51	0:40	1:13	1:07	1:23	1:11	1:08
<b>Social Networking</b>	5:24	6:32	5:54	4:18	3:48	6:15	5:58	5:36	6:16	5:32
<b>App/Web on a Tablet</b>	10:55	9:35	10:36	11:38	12:08	10:06	10:21	11:43	10:09	10:19
<b>Video Focused App/Web</b>	2:19	3:08	2:49	1:44	1:14	2:58	2:43	2:02	3:24	2:25
<b>Streaming Audio</b>	0:46	0:46	0:48	0:50	0:32	0:47	0:43	1:22	0:42	0:40
<b>Social Networking</b>	2:03	1:48	2:01	2:06	2:21	1:54	2:00	1:55	1:41	1:54

## Q2 2018 WEEKLY REACH OF USERS (000) BY MEDIUM

	A 18+	A 18-34	A 35-49	A 50-64	A 65+	A 18-49	A 25-54	BLACK 18+	HISPANIC 18+	ASIAN AM. 18+
<b>Total Use of Television</b>	223,872	60,358	56,300	59,461	47,754	116,658	113,351	28,636	35,159	12,727
<b>Live+Time-Shifted TV</b>	216,215	55,592	54,420	58,692	47,511	110,012	108,347	28,044	33,782	11,588
<b>Time-Shifted TV</b>	126,015	30,502	35,217	35,478	24,818	65,719	67,981	16,030	15,962	5,918
<b>TV-Connected Devices</b>	123,881	43,688	36,366	27,686	16,141	80,054	74,366	14,898	20,555	8,445
<b>DVD/Blu-ray Device</b>	33,401	7,009	9,430	9,786	7,176	16,439	17,436	3,493	4,220	1,415
<b>Game Console</b>	37,035	20,405	11,340	4,045	1,245	31,744	25,380	4,746	6,889	2,000
<b>Internet Connected Device</b>	87,962	30,970	26,985	19,523	10,484	57,954	54,776	10,333	15,169	6,933
<b>Radio</b>	227,021	66,578	56,991	59,172	44,279	123,570	116,478	28,709	36,927	n/a
<b>Internet on a Computer</b>	132,801	39,709	35,631	34,783	22,678	75,340	71,787	14,729	16,118	9,729
<b>Social Networking</b>	64,655	18,998	18,317	17,051	10,289	37,315	36,521	6,429	6,714	5,003
<b>Video on a Computer</b>	56,049	18,829	16,083	13,619	7,517	34,912	32,721	6,826	6,994	4,525
<b>App/Web on a Smartphone</b>	192,057	62,233	52,098	49,523	28,203	114,331	106,467	24,425	30,385	12,558
<b>Video Focused App/Web</b>	147,112	52,507	41,929	34,430	18,246	94,436	86,135	20,140	25,139	9,596
<b>Streaming Audio</b>	106,812	42,954	29,721	22,718	11,418	72,676	63,296	14,480	18,627	7,226
<b>Social Networking</b>	178,769	59,317	48,771	45,182	25,499	108,088	99,901	22,792	28,070	11,599
<b>App/Web on a Tablet</b>	112,692	29,538	30,755	30,098	22,301	60,293	60,222	12,739	16,234	7,819
<b>Video Focused App/Web</b>	67,631	18,794	18,335	17,039	13,463	37,129	36,832	7,994	10,852	4,694
<b>Streaming Audio</b>	31,325	11,332	8,627	7,273	4,093	19,959	18,593	16,343	5,054	2,360
<b>Social Networking</b>	82,618	20,621	21,051	22,933	18,014	41,671	42,008	9,199	11,283	5,617

## Q2 2018 WEEKLY REACH % OF USERS AMONG U.S. POPULATION

	A 18+	A 18-34	A 35-49	A 50-64	A 65+	A 18-49	A 25-54	BLACK 18+	HISPANIC 18+	ASIAN AM. 18+
<b>Total Use of Television</b>	91%	82%	93%	94%	95%	87%	91%	92%	91%	79%
<b>Live+Time-Shifted TV</b>	87%	76%	90%	93%	95%	82%	87%	90%	88%	72%
<b>Time-Shifted TV</b>	51%	41%	58%	56%	49%	49%	55%	51%	41%	37%
<b>TV-Connected Devices</b>	50%	59%	60%	44%	32%	60%	60%	48%	53%	52%
<b>DVD/Blu-ray Device</b>	14%	10%	16%	16%	14%	12%	14%	11%	11%	9%
<b>Game Console</b>	15%	28%	19%	6%	2%	24%	20%	15%	18%	12%
<b>Internet Connected Device</b>	36%	42%	45%	31%	21%	43%	44%	33%	39%	43%
<b>Radio</b>	92%	91%	94%	94%	88%	92%	93%	92%	96%	n/a
<b>Internet on a Computer</b>	54%	54%	59%	55%	45%	56%	58%	48%	42%	63%
<b>Social Networking</b>	26%	26%	30%	27%	20%	28%	29%	21%	17%	33%
<b>Video on a Computer</b>	23%	26%	27%	22%	15%	26%	26%	22%	18%	29%
<b>App/Web on a Smartphone</b>	78%	85%	86%	78%	56%	86%	86%	79%	79%	82%
<b>Video Focused App/Web</b>	60%	72%	69%	55%	36%	71%	69%	65%	65%	63%
<b>Streaming Audio</b>	43%	59%	49%	36%	23%	54%	51%	47%	48%	47%
<b>Social Networking</b>	72%	81%	81%	72%	51%	81%	80%	74%	73%	76%
<b>App/Web on a Tablet</b>	46%	40%	51%	48%	44%	45%	48%	41%	42%	51%
<b>Video Focused App/Web</b>	27%	26%	30%	27%	27%	28%	30%	26%	28%	31%
<b>Streaming Audio</b>	13%	15%	14%	12%	8%	15%	15%	53%	13%	15%
<b>Social Networking</b>	33%	28%	35%	36%	36%	31%	34%	30%	29%	37%

## Q2 2018 TOTAL PERSONS, KIDS, AND TEENS

### WEEKLY SUMMARY OF USAGE

TOTAL (P2+)	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
<b>Total Use of Television</b>	32:31	33:14	282,460	90%
<b>Live+Time-Shifted TV</b>	26:44	28:37	270,428	86%
<b>Time-Shifted TV</b>	3:13	6:08	154,242	49%
<b>TV-Connected Devices</b>	5:47	9:55	166,506	53%
<b>DVD/Blu-ray Device</b>	0:38	4:08	43,476	14%
<b>Game Console</b>	1:57	9:35	57,833	18%
<b>Internet Connected Device</b>	3:12	7:50	116,839	37%
<b>Radio (P12+)</b>	11:40	12:51	248,645	91%

KIDS 2-11	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
<b>Total Use of Television</b>	23:10	21:05	37,044	91%
<b>Live+Time-Shifted TV</b>	14:52	14:06	34,247	84%
<b>Time-Shifted TV</b>	1:41	3:06	18,390	45%
<b>TV-Connected Devices</b>	8:18	10:50	27,466	67%
<b>DVD/Blu-ray Device</b>	0:56	4:29	7,092	17%
<b>Game Console</b>	2:50	8:24	12,162	30%
<b>Internet Connected Device</b>	4:32	8:27	19,354	48%

TEENS 12-17	HH:MM (POP)	HH:MM (USERS)	REACH (000)	REACH %
<b>Total Use of Television</b>	18:06	18:11	21,544	86%
<b>Live+Time-Shifted TV</b>	10:12	10:47	19,966	80%
<b>Time-Shifted TV</b>	1:10	2:34	9,836	39%
<b>TV-Connected Devices</b>	7:55	11:36	15,159	61%
<b>DVD/Blu-ray Device</b>	0:30	3:28	2,983	12%
<b>Game Console</b>	4:27	11:38	8,637	35%
<b>Internet Connected Device</b>	2:58	6:49	9,523	38%
<b>Radio</b>	6:24	7:26	21,624	87%





# REFERENCE

# DIGITAL AUDIENCE MEASUREMENT

THE FOLLOWING TABLE PROVIDES ADDITIONAL DETAIL ON WHAT IS AND IS NOT INCLUDED IN DIGITAL MEASUREMENT WITHIN THIS REPORT.

	INCLUDES	DOES NOT INCLUDE
<b>Internet on a Computer</b>	Computer measurement of web surfing	Internet Applications (Non-browser applications such as office apps, email apps, banking information, private/incognito browsing), video streaming in web players
<b>Social Networking on a Computer</b>	All sites in the Member Communities subcategory as defined in the Nielsen dictionary	Reddit, YouTube, and other sites with active public forums and comments sections
<b>Video on a Computer</b>	Computer video played in a web browser	Untagged content where audio is not present
<b>App/Web on a Smartphone</b>	<ul style="list-style-type: none"> <li>Android: all app/web activity, measured passively</li> <li>iOS: all activity routed through an http and https proxy for both app and browser URLs</li> </ul>	<ul style="list-style-type: none"> <li>iOS apps with no http/https activity (Ex. Calculator, Notes)</li> <li>Email activity through the standard Mail app for iOS</li> <li>Standard text messaging and iMessage is not included</li> </ul>
<b>Video Focused App/Web on a Smartphone</b>	Apps and websites whose primary function is to provide video content (Ex. Netflix, YouTube, HBOGO)	Video content available on apps and websites where video is not the primary focus (Ex. CNN, Weather Channel). Video on social networks (Ex. Facebook, Snapchat) is not measured here but is included in Social Networking on a Smartphone
<b>Streaming Audio on a Smartphone</b>	Apps and websites specifically designed to provide audio content (Ex. Pandora, Spotify, iHeartRadio)	Audio content through apps that also provide video capabilities (Ex. YouTube, VEVO). That content is measured under Video Focused App/Web on a Smartphone.
<b>Social Networking on a Smartphone</b>	All apps/sites in the Social Networking subcategory as defined in the Nielsen dictionary	Apps and websites designated elsewhere in the Nielsen dictionary with active public forums and comments sections
<b>App/Web on a Tablet</b>	iOS: all activity routed through an http and https proxy for both app and browser URLs	<ul style="list-style-type: none"> <li>Android tablets</li> <li>iOS apps with no http/https activity (Ex. Calculator, Notes)</li> <li>Email activity through the standard Mail app for iOS</li> <li>Standard text messaging and iMessage is not included</li> </ul>
<b>Video Focused App/Web on a Tablet</b>	Apps and websites whose primary function is to provide video content (Ex. Netflix, YouTube, HBOGO)	Video content available on apps and websites where video is not the primary focus (Ex. CNN, Weather Channel). Video on social networks (Ex. Facebook, Snapchat) is not measured here but is included in Social Networking on a Tablet
<b>Streaming Audio on a Tablet</b>	Apps and sites specifically designed to provide audio content (Ex. Pandora, Spotify, iHeartRadio)	Audio content through apps that also provide video capabilities (Ex. YouTube, VEVO). That content is measured under Video Focused App/Web on a Tablet
<b>Social Networking on a Tablet</b>	All apps/sites in the Social Networking subcategory as defined in the Nielsen dictionary	Apps and websites designated elsewhere in the Nielsen dictionary with active public forums and comments sections

# GLOSSARY

**Broadband Only:** A household with at least one operable TV/monitor that receives video exclusively through a broadband internet connection instead of traditional means (over-the-air, wired cable, telco, satellite).

**Enabled Smart TV:** A household with at least one television set that is capable and enabled to access the internet.

**Internet Connected Device:** Devices connected to the TV that are used to stream content such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc. It is inclusive of Smart TV apps when used to represent device usage.

**Internet Enabled TV-Connected Device:** A category of devices capable and enabled to access the internet through the television. Devices would include internet enabled Smart TVs, video game consoles and internet connected devices.

**Linear Platforms:** Represent a combination of both traditional television and radio media platforms

**Over the Air:** A mode of television content delivery that does not involve satellite transmission or cable (i.e.—a paid service). Also commonly referred to as “broadcast.”

**Radio:** Listening to AM/FM radio stations, digital streams of AM/FM stations (where captured in diary markets or encoded in PPM markets), HD radio stations, and satellite radio as captured in diary markets only. No other forms of radio or audio are included at this time.

**Satellite TV:** A paid TV subscription where the signal is distributed to an orbiting satellite. The amplified signal is then re-transmitted to the home and received via a dish. (Sometimes also referred to as “dish.”)

**Subscription Video on Demand (SVOD):** A household with access to a subscription video on demand service. For the purpose of this report, this is limited to Netflix, Hulu, and Amazon Prime.

**Telco:** A paid TV subscription delivered fiber-optically via a traditional telephone provider.

**Total Multichannel:** Inclusive of Traditional Cable Plus (Wired Cable, Telco, Satellite) as well as homes that subscribe to a vMVPD service.

**Total Use of Television:** The sum of Live+Time shifted TV, DVD/Blu-ray device, Game Console, and Internet Connected Device usage. Combining all these sources provides the total usage on the television screen.

**Traditional Cable:** Group of TV subscription services that include wired cable, satellite or telco providers.

**TV Household:** A home with at least one operable TV/monitor with the ability to deliver video via traditional means of antennae, cable STB or Satellite receiver and/or with a broadband connection.

**Virtual Providers (vMVPDs):** Distributors that aggregate linear content licensed from major programming networks and package together in a standalone subscription format and accessible on devices with a broadband connection.

**Wired Cable:** Traditional cable delivered through wires to your home.

## TELEVISION METHODOLOGY

Television data are derived from Nielsen's National TV Panel that is based on a sample of over 40,000 homes that are selected based on area probability sampling.

Live+Time-shifted TV (PUT) includes Live usage plus any playback viewing within the measurement period. Time-shifted TV is playback primarily on a DVR but includes playback of encoded content from video on demand, DVD recorders, server based DVRs and services like Start Over. Total Use of Television (TUT) includes Live TV + Time-shifted TV as well as TV-connected devices (DVD, Game Console, Internet Connected Device).

TV-connected devices include content being viewed on the TV screen through these devices. This includes when these devices are in use for any purpose, not just for accessing media content. For example, Game Console also includes when it is being used to play video games. Internet Connected Device usage includes Smart TV app usage.

Reach for television and TV-connected devices includes those viewing at least one minute within the measurement period.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences include both English and Spanish speaking representative populations.

## RADIO METHODOLOGY

Audience estimates for 48 large markets are based on panel who carries a portable device called a Portable People Meter (PPM) that passively detects exposure to content containing inaudible codes embedded within. Audience estimates from the balance of markets in the U.S. are based on surveys of people who record their listening in a written diary for a week.

Estimates in this report are based on RADAR and the National Regional Database. RADAR reports national network radio ratings using both PPM and Diary measurement and it is based on a rolling one-year average of nearly 400,000 respondents ages 12+ per year. The Q2 2018 report is based on the September RADAR studies.

Listening to HD radio broadcasts, Internet streams of AM/FM radio stations and Satellite Radio is included in the Persons Using Radio estimates in this report where the tuning meets our reporting and crediting requirements of at least 5 minutes of usage. Reach for Radio includes those listening for at least 5 minutes within the measurement period.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences include both English and Spanish speaking representative populations.

## DIGITAL METHODOLOGY (COMPUTER, SMARTPHONE, TABLET)

Digital data is based on Nielsen's Total Media Fusion, which is reflective of both panel and census measurement. It leverages the most granular and comprehensive cross-platform respondent-level data from our panels, along with census data from Nielsen's Total Audience Measurement solutions, to provide the highest quality, representative sample of digital media consumption. Data for this was sourced from Nielsen Media Impact (Nielsen's cross platform planning solution).

Data used in this report is inclusive of multicultural audiences. For computer, Hispanic consumer audiences include both English and Spanish speaking representative populations. For mobile, recruitment of Spanish language audiences began in early 2017 and representation of Spanish Dominant Hispanic audiences continues to improve.

## SOURCING

### TIME SPENT AMONG U.S. POPULATION, TIME SPENT AMONG USERS, REACH OF USERS, REACH %

Total Use of Television, Live+Time-shifted TV, Live TV, Time-shifted TV, TV-Connected Devices (DVD, Game Console, Internet Connected Device) 04/02/18- 07/01/18 via Nielsen NPOWER/National Panel; Radio 06/22/2017 – 06/20/2018 via RADAR 138 and Radio Nationwide Spring 2018; Computer, Smartphone, Tablet via Total Media Fusion sourced from Nielsen Media Impact. For digital data, weeks that cross calendar months are not included. Weeks included for digital – 04/02/18, 04/09/18, 04/16/18, 04/23/18, 05/07/18, 05/14/18, 05/21/18, 06/04/18, 06/11/18, 06/18/18. Digital data was produced on 09/21/18 and slight variations in data processed after this point reflect ongoing updates.

Note: Time spent among U.S. population includes whether or not they have the technology, and data sources can be added or subtracted as appropriate. Time spent among users of each medium would include different bases by source, and data sources should not be added or subtracted. Time spent among U.S. population includes visitor viewing and time spent among users excludes visitor viewing resulting in occurrences of reported time spent for U.S. population to be higher than users.

Some amount of simultaneous usage may occur across devices.

Sum of individual sources may vary slightly from total due to rounding.

### TELEVISION DISTRIBUTION STATUS, DEVICE OWNERSHIP

Based on scaled installed counts for June 15, 2018 via Nielsen NPOWER/National Panel.

### THE AUDIO UNIVERSE

Radio is based on Nielsen RADAR and the National Regional Database. Streaming audio on smartphone and tablet are based on Nielsen's Total Media Fusion. Podcasts are based on Nielsen's Podcast Fusion Data (NScore). Satellite Radio is based on Nielsen Scarborough USA+ release 01/2018.

### MEDIATECH TRENDER SURVEY

Nielsen's MediaTech Trender is a quarterly consumer tracking study launched in Q1 2018 by Nielsen Media Analytics. The online survey is offered in both English and Spanish to a U.S. general population sample 13 years or older. Based on Q2 2018 data.

### MEDIA ENTHUSIAST COMMUNITY SURVEY

The Nielsen Media Enthusiasts Community is an online insight community that is directly recruited and managed by Nielsen. Community members are regular U.S. adult consumers recruited to be trusted advisers and share their opinions about media and technology topics through research activities such as surveys, discussion forums, etc. The Simultaneous Usage study was conducted in English only in October, 2018, with a total of 1,667 respondents.

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## ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit [www.nielsen.com](http://www.nielsen.com).



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